



## Jackson Lifts reaches new heights with Microsoft Dynamics NAV and Brookland Solutions

Jackson Lifts, a Microsoft Dynamics NAV user, was looking for a reliable, experienced IT partner to support and develop its group-wide, business critical ERP solution. Brookland Solutions fitted the bill.

Following a sustained period of growth, Jackson Lifts had replaced its in-house solutions with a purpose-built Microsoft Dynamics NAV system. Jackson Lifts chose Dynamics NAV because it was confident it would support growth plans over the next 10 years; it would be able to customise and scale the solution as the business developed.

In collaboration with Brookland, Jackson Lifts has extended and customised Dynamics NAV to support the entire business – from enquiry through to proposal, instruction, material orders, construction, service delivery and billing.

### A new Dynamics NAV partner

Having replaced its in-house line of business solution with Microsoft Dynamics NAV, Jackson lifts was looking for a partner that it could rely on to support the installation and provide integration and development services that would allow Dynamics NAV to drive the business forward.

John Clarke, Director of Jackson Lifts, says: "Having invested significantly in developing a highly configured solution based on Microsoft Dynamics NAV, we were concerned about the quality of relationship with our IT supplier and confidence in moving forward in a constructive way diminished.

"Fortunately, we identified an emerging Microsoft Dynamics NAV partner with considerable project management and consultancy expertise.

"Working with Brookland Solutions, we quickly experienced the levels of service expected and are now working in partnership. Not only do they provide an excellent support service, they have helped us to enhance our Dynamics NAV system to deliver significant cost savings."

### Confidence in a business critical system

In collaboration with Brookland Solutions, Jackson Lifts' further customised its Microsoft Dynamics NAV system to underpin its entire business: it supports cost estimating and engineering functions for its Installation Division; it is used by the Services Division to manage complex billing requirements across preventative maintenance, reactive maintenance and billing against planned repair agreement. In fact, the whole business now depends on Microsoft Dynamics NAV.

Stafford Bennell, Director, Brookland Solutions says, "Jackson Lifts had already invested heavily in its Microsoft Dynamics NAV system. Our objective was to continue to develop the system further, align it with their growth plans and drive additional business benefits and cost savings. With several of our key consultants already familiar with their system, we were absolutely confident that we could deliver to our promise."



Established in 1979, with annual revenues currently in excess of £35m, The Jackson Lift Group is the largest independent lift, escalator and cradle maintenance company operating nationwide. Its principle services are lift, escalator and cradle maintenance, servicing, repairs, modernisation, consultancy and new installations. The business operates as two different divisions - Installations and Services.

[www.jacksonlifts.com](http://www.jacksonlifts.com)

### Results

- £35,000 saving from reduced paper-based filing and retrieval
- Cash reserves increased by £1million through improved credit control processes
- 360 degree view of contract-based work
- Immediate access to granular sales information
- Accurate cost estimating and greater confidence in projected profit margins for complex projects

#### Cost cutting through innovation

Working with another third party supplier, Jackson Lifts implemented digital pen technology to simplify electronic data capture and automated forms processing. Engineers use digital pens to complete their reports and worksheets and information is sent back digitally via email as an attached PDF and XML file. Brookland Solutions developed the complex NAV import routines to validate the data, import it into the functions within Microsoft Dynamics NAV and attach files to the relevant jobs.

Jackson Lifts carries out 140,000 maintenance visits a year. Before integrating digital pen technology, this meant 140,000 pieces of paper, all of which had to be keyed into the system. "Seven members of staff would spend up to two hours per day simply entering data. Now this process can be completed by one person in just one day per month", says Clarke.

"This, combined with the time it would take to file manually 140,000 documents represents a saving of at least £35,000. It's also much more environmentally friendly."

#### Optimised credit control

Integrating data from engineering reports and call-out jobs significantly streamlined the credit control process. Clarke says, "Having all information relating to a contract, job or engineering report within one single system, means that our credit control team can simply pull out the job, click a button and email the details to the client."

"The impact has been massive. We have been able to really tighten up our credit control procedures. As a result, we have increased cash in the bank by £1million over a 12 month period. These integration projects have given us ROI in spades."

#### Powerful management reporting

Brookland Solutions enabled Jackson Lifts to develop Microsoft Dynamics NAV's powerful reporting capabilities, giving it a complete view of all contract-based work; if there are any client issues that need resolving, staff can easily see a complete picture of the contract – including financial status.

"The level of detailed management information we can get from Microsoft Dynamics NAV has enabled us to build our business further," says Clarke.

"For example, we can run one report on everything that has been billed for the business, and we can analyse by period and compare performance to the previous year. We know sales targets by region and we can take action if we can determine whether or not a region is behind target for example."

#### Accurate cost estimating

Jackson Lifts works on a diverse range of projects, with its most recent project valued at £3.4million. Complex project requirements mean that its costing system has to be accurate. Using Microsoft Dynamics NAV, estimators can start with a complete list of everything needed for a list construction project and break the quote down rather than build it up. All elements of a project can be costed individually, including the addition of non-standard costs such as builders' and labour costs.

"We can be very confident in the accuracy of our job costing process," says Clarke. "This means we can make strategic decisions on the levels of profit margins we add to projects to ensure we are competitive. We can make decisions on taking smaller projects on at certain times of the year for example."

#### High confidence in support and service delivery

Jackson Lifts is very proactive in its use of Microsoft Dynamics NAV and relies on Brookland Solutions to collaborate on and support integration projects. Clarke says, "Brookland Solutions knows how to get the most out of Microsoft Dynamics NAV. In fact, with their guidance, we haven't yet found anything that we wanted to do that it hasn't been capable of doing."

"We know the Brookland team really well and we are confident that they will continue to help us drive our business forward."

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